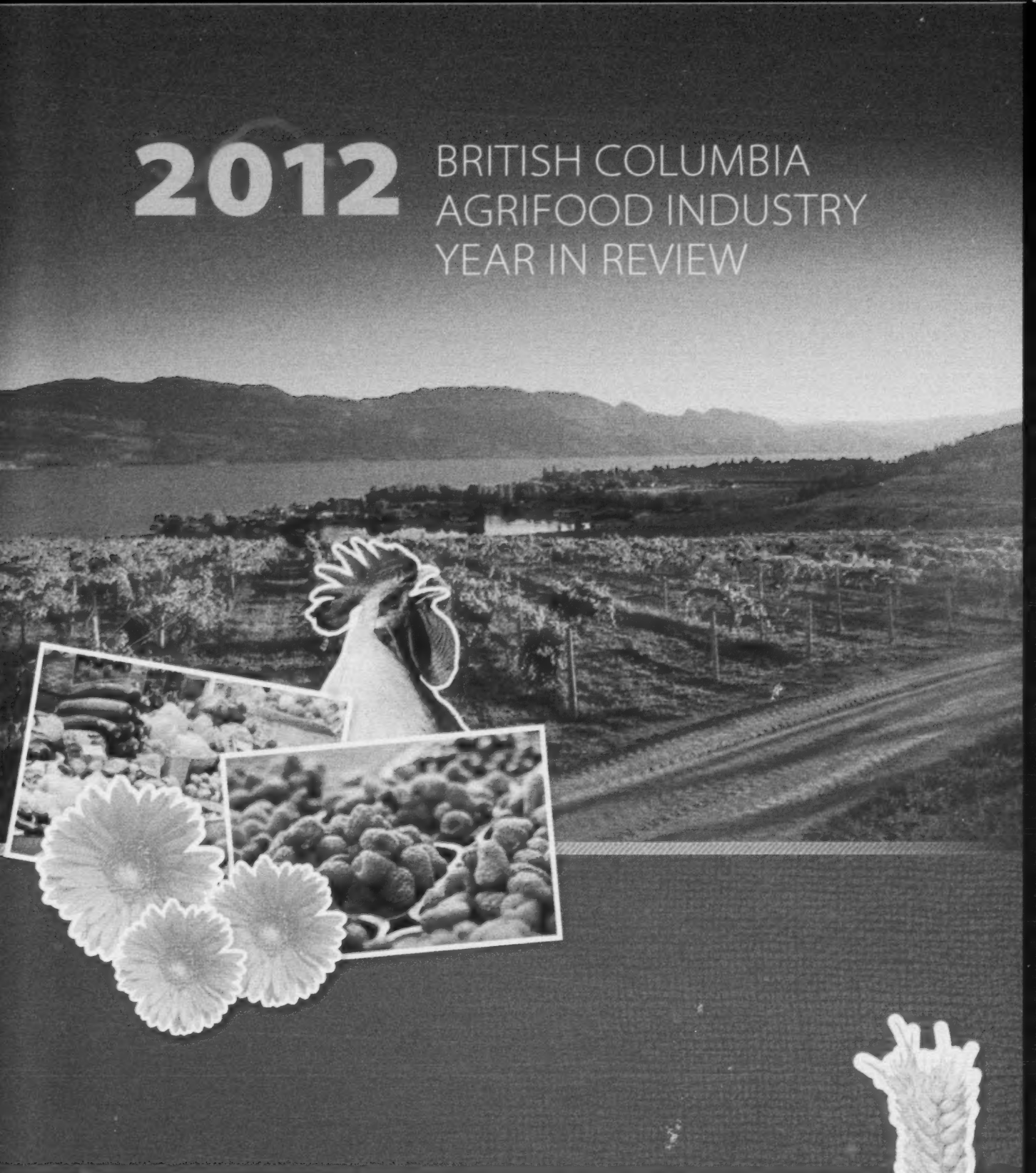
2012 BRITISH COLUMBIA AGRIFOOD INDUSTRY YEAR IN REVIEW



Growing Forward 2

BRITISH COLUMBIA

Canada

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The FEDERAL MINISTER *of* AGRICULTURE

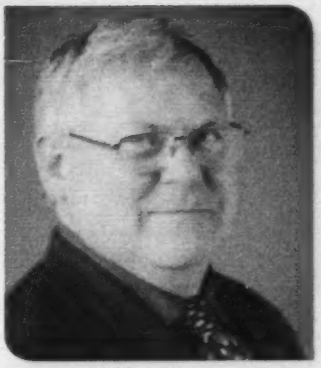
British Columbia is known world-wide for producing top-quality food and agri-based products. In fact, seven of B.C.'s crops, such as blueberries, sweet cherries, and raspberries, led the country in sales in 2012.

This year, federal, provincial and territorial governments introduced Growing Forward 2, Canada's new 5 year agriculture policy framework. The previous Growing Forward framework achieved some outstanding results in British Columbia, from market access, to innovation, to food safety and the environment.

With Growing Forward 2, Minister Pimm and I are building on that success with $105 million in investments to move the industry forward. Overall, Growing Forward 2 is setting the stage for Canadian farmers to capitalize on emerging opportunities while giving them the tools to best manage their business risks. At its core is a 50 per cent increase in cost-shared strategic investments in innovation, competitiveness and market development.

Our Government will continue to work with B.C. and its innovative agricultural industry to help our farmers remain profitable and position the sector for long-term growth. As this Year in Review clearly shows, it is a great time to be in agriculture. With exciting, new opportunities on the horizon, I am confident that this industry will only continue to grow.

Gerry Ritz, PC, MP
Agriculture Minister



The B.C. MINISTER *of* AGRICULTURE

Welcome to the Ministry of Agriculture's 2012 Agrifood Year in Review. British Columbia's agriculture and food processing sectors play a significant role in generating jobs, stimulating investment and encouraging growth and stability in communities across the province.

It has been another successful year as our agriculture, seafood and food processing sectors' revenue grew to $11.7 billion in 2012, and is on the way to meeting our target of $14 billion a year by 2017. That growth represents new dollars in the pockets of B.C. farmers, ranchers and food processors, and opportunities for more British Columbians to join the more than 61,000 of us already working in B.C.'s agrifoods sector.

In 2012, B.C. foods were enjoyed here at home and around the world. The Ministry of Agriculture proudly launched our very successful Buy Local Program in August 2012, with $2 million in funding to help businesses and organizations launch or expand their own marketing campaigns. The passion for local foods has never been stronger and the Buy Local Program is a great example of government and the agrifoods industry working together, to promote local foods, and generate economic benefits for B.C.'s food producers and communities.

B.C. foods continue to be chosen for their high quality around the world too, with our top five exports markets being the USA, Japan, China, Taiwan and Hong Kong. B.C. Government staff here at home and in our trade offices around the world are continuing to work with industry so that exports continue to grow, and more dollars and jobs head to food producing families and communities around B.C.

I hope this year's publication leaves you as excited about the opportunities for B.C. as I am. More information about our agrifood producers can be found at *www.gov.bc.ca/agri* and *www.bcseafood.ca*

Pat Pimm
Minister of Agriculture

2012 INDUSTRY HIGHLIGHTS

British Columbia's agrifoods sector includes primary production in agriculture, aquaculture and commercial fisheries, and processing of food & beverages. In 2012, the sector generated $11.7 billion in combined gross revenues and exported $2.5 billion worth of products to more than 130 countries.

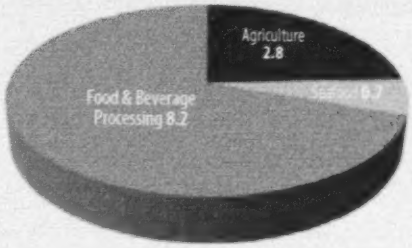
This document focuses on the B.C. agriculture and food & beverage processing sectors. The provincial seafood sector is profiled in the B.C. Seafood Industry Year in Review, available at *www.bcseafood.ca.*

Around the province's varied landscapes and different climatic zones, B.C.'s farmers and food and beverage processors produce an astounding array of food products to supply both local and export markets.

Provincial agriculture farm cash receipts from the sale of crops (including grains, oilseeds, tree fruits, berries, grapes, field and greenhouse vegetables, floriculture, nursery, forage and other crops) reached nearly $1.4 billion.

Total livestock receipts from the sale of cattle, hogs, poultry, eggs, dairy, honey and other animals and animal products generated close to $1.4 billion.

B.C. AGRIFOODS REVENUES 2012 ($ BILLIONS)

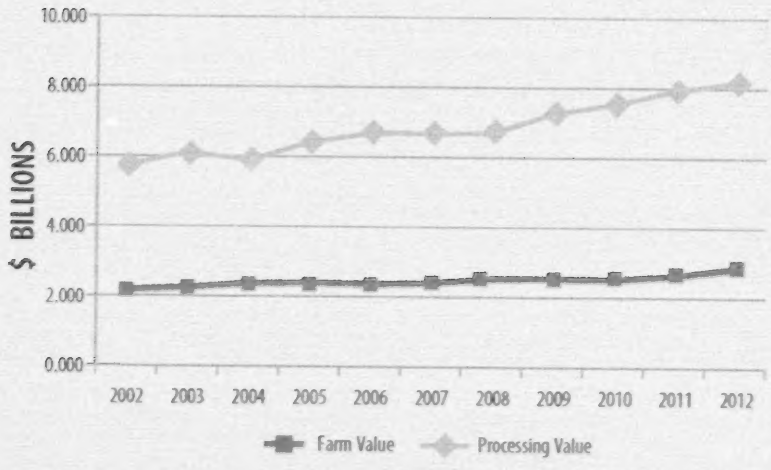


The province's food and beverage processors generated an additional $8.2 billion in sales.

The industry's nearly 20,000 farms utilized 2.6 million hectares – less than three per cent of the provincial land base – to produce more than 200 agriculture and agrifood commodities.

Seven of B.C.'s crops led the country in sales in 2012: blueberries, sweet cherries, raspberries, pears, apricots, Brussels sprouts and rhubarb. Seventeen ranked second: floriculture products, nursery products, greenhouse tomatoes, greenhouse peppers, greenhouse cucumbers, mushrooms, grapes, apples, cranberries, peaches, nectarines, lettuce, pumpkins, spinach, garlic, field cucumbers, and leeks.

BRITISH COLUMBIA AGRIFOOD INDUSTRY



JOB COUNT:

26,000 Primary Agriculture
31,800 Food & Beverage Processing
57,800 TOTAL AGRIFOOD

3,800 Primary Seafood
61,600 TOTAL B.C. AGRIFOODS

INDUSTRY PERFORMANCE

In 2012, total farm cash receipts generated by British Columbia's agriculture sector rose eight per cent to $2.8 billion and total food and beverage processing shipments rose three per cent to $8.2 billion.

Included in the farm cash receipts total is farm sales of crop and livestock/poultry products, as well as direct program payments made to producers. The crop and livestock/poultry sectors generated almost equal shares of the provincial farm cash receipts. Sales from the crop sector contributed $1.36 billion (a 48 per cent share) and sales from livestock and poultry sectors contributed $1.39 billion (a 49 per cent share). The remaining $86 million was generated by direct program payments.

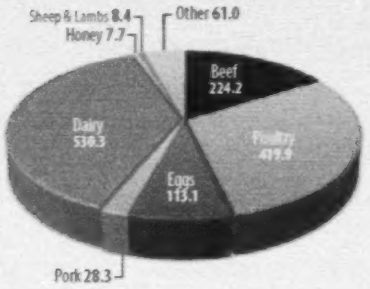
B.C.'s dairy sector generated 19 per cent of the provincial farm cash receipts in 2012, followed by poultry at 15 per cent, floriculture and greenhouse vegetables both at nine per cent, and beef at eight per cent.

Food processing accounted for 86 per cent of B.C.'s total food and beverage processing shipments value in 2012 and beverage processing accounted for 14 per cent. Close to 1,100 food processing firms, along with more than 300 beverage processing firms, generated combined shipments valued at $8.2 billion – the largest manufacturing sector in the province.

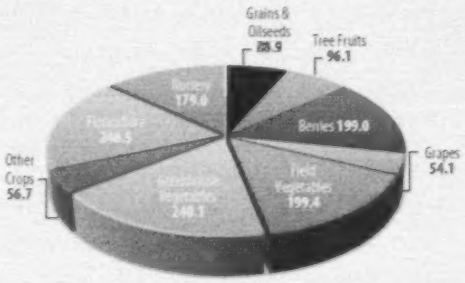
VALUE OF B.C. AGRICULTURE ($ MILLIONS)

Sector	5 Year Average (2007-2011)	2011	2012	2012 vs. 2011	2012 vs. 5 Year Average
Crops	1,173	1,258	1,362	8.2%	16.1%
Livestock and Poultry	1,254	1,308	1,393	6.5%	11.1%
Direct Program Payments	92	65	86	31.8%	-6.0%
Agriculture Total Farm Cash Receipts	2,519	2,631	2,841	8.0%	12.8%
Seafood (Aquaculture & Capture Fisheries)	766	813	669	-17.7%	-12.7%
Food and Beverage Processing Shipments	7,255	7,940	8,176	3.0%	13.2%
B.C. AGRIFOODS TOTAL REVENUES	10,540	11,384	11,686	2.7%	10.9%

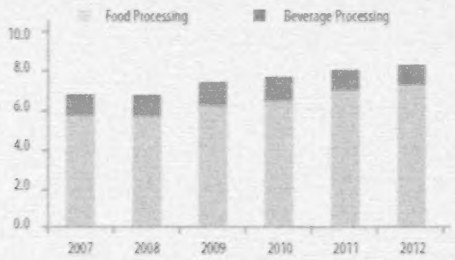
B.C. LIVESTOCK & POULTRY PRODUCTS 2012 FARM CASH RECEIPTS ($ MILLIONS)



B.C. CROPS 2012 FARM CASH RECEIPTS ($ MILLIONS)



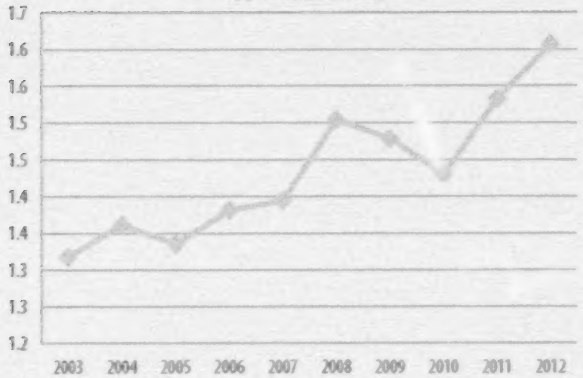
B.C. FOOD AND BEVERAGE PROCESSING VALUE OF SHIPMENTS ($ BILLIONS)



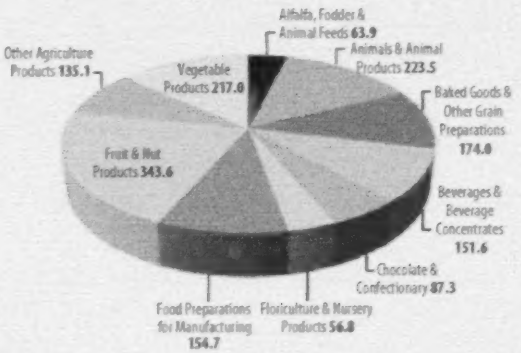
AGRICULTURE EXPORT HIGHLIGHTS

In 2012, the value of British Columbia agriculture exports grew five per cent to $1.6 billion.

B.C. TOTAL EXPORTS ($ BILLIONS)



B.C. EXPORTS BY PRODUCT GROUPING ($ MILLIONS)


Alfalfa, Fodder & Animal Feeds 63.9
Animals & Animal Products 223.5
Baked Goods & Other Grain Preparations 174.0
Beverages & Beverage Concentrates 151.6
Chocolate & Confectionary 87.3
Floriculture & Nursery Products 56.8
Food Preparations for Manufacturing 154.7
Fruit & Nut Products 343.6
Other Agriculture Products 135.1
Vegetable Products 217.0

COUNTRY EXPORT HIGHLIGHTS

British Columbia agriculture's fastest growing markets in 2012 were Russia and Hong Kong with export values rising 249 and 36 per cent respectively over 2011.

Eighty-eight per cent ($1.4 billion) of the province's agriculture export value went to our top five markets – the United States, Japan, China, Taiwan and Hong Kong.

Exports of cranberries, blueberries and chocolate & cocoa preparations all increased substantially over 2011, by 63 per cent, 31 per cent and 23 per cent respectively.

Large decreases in exports were seen in alfalfa, fodder & animal feeds (a decrease of 19 per cent over 2011) and tomatoes (a decrease of 16 per cent over 2011).

Country	Export Value ($ millions)	Export Share (%)	Top Products
United States	1,242.5	77	Baked Goods, Food Preparations, Blueberries, Chocolate & Cocoa Preparations, Mushrooms
Japan	58.5	4	Pork Products, Water, Frozen Blueberries, Rapeseeds, Baked Goods
China	49.1	3	Pork Products, Wine, Food Preparations, Rapeseeds, Frozen Blueberries
Taiwan	34.6	2	Poultry Products, Cherries, Pork Products, Food Preparations, Water
Hong Kong	31.4	2	Cherries, Ginseng, Poultry Products, Food Preparations, Egg Products
Rest of World	191.4	12	Food Preparations, Pork Products, Poultry Products, Dairy Products, Fats & Oils
TOTAL B.C.	**1,607.5**	**100**	**Food Preparations, Baked Goods, Blueberries, Chocolate Products, Mushrooms**

B.C. FRUITS *and* NUTS

With over 242,000 tonnes of fruit produced and marketed, B.C. accounted for Canada's largest fruit crop in 2012, valued at $349 million.

B.C.'s diverse climate enables the production of a wide variety of high-quality berries, wine grapes, tree-fruits and nuts on nearly 61,000 acres of farmland. In 2012, B.C. farmers produced and marketed over 242,000 tonnes of tree fruits, berries, grapes and nuts and accounted for the largest share (34 per cent) of the nation's total fruit and nut production.

Farm cash receipts from fruits and nuts reached $349 million, a 23 per cent increase over 2011 and a 37 per cent increase over the previous five-year average. B.C. ranked #1 in Canada with 41 per cent of the nation's farm cash receipts in fruit and nuts.

Key factors that influenced B.C.'s 2012 production and farm cash receipts include:

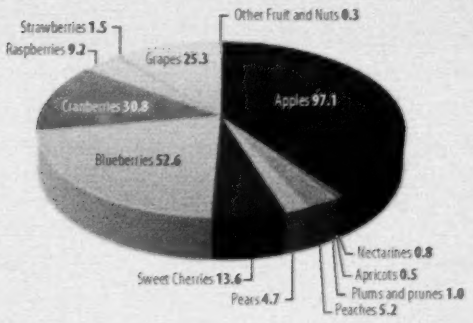
- Favourable growing and harvesting conditions for B.C.'s blueberry and cranberry growers at the same time as additional blueberry and cranberry acreage came into production; and
- Severe spring weather (extreme heat, followed by extreme frost) which caused failures in much of eastern North America's berry and apple crops, and resulted in improved prices over 2011 for B.C.'s growers.

More than 4,600 farms grow fruit or nuts on nearly 61,000 acres in B.C., including 18,600 acres in tree fruits, close to 33,000 acres in berries, and more than 9,100 acres in grapes. Included in the total tree fruit acreage is approximately 1,200 acres in nuts – primarily hazelnuts, along with some walnuts, and to a much smaller extent, chestnuts.

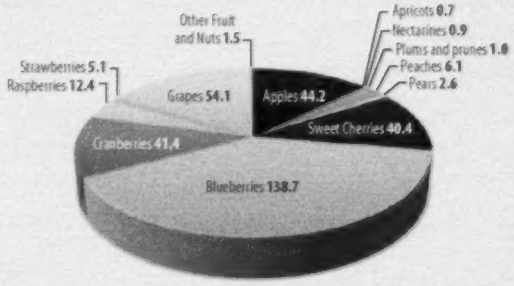
In 2012, in terms of fruit production, B.C. was Canada's largest producer of blueberries, sweet cherries, raspberries, pears and apricots and Canada's second largest producer of apples, cranberries, grapes, peaches, strawberries and nectarines.

B.C. exported $343.6 million worth of fruit and nut products to 37 different countries in 2012, a $76 million dollar increase (28 per cent) over 2011. The top five fruit exports were blueberries, cherries, cranberries, apples, and raspberries.

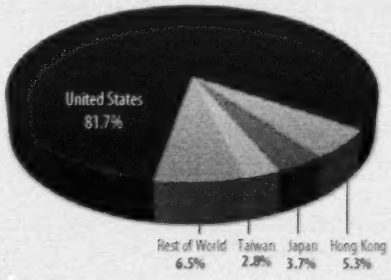
B.C. FRUITS & NUTS
2012 MARKETED PRODUCTION
('000 TONNES)

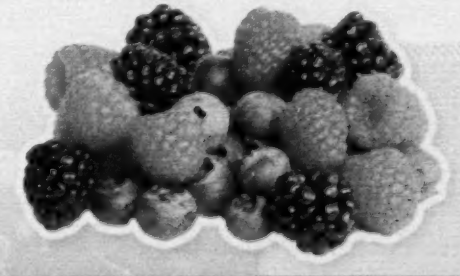


B.C. FRUITS & NUTS
2012 FARM CASH RECEIPTS ($ MILLIONS)



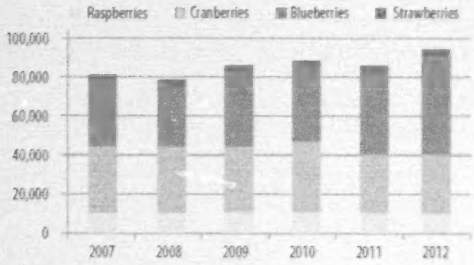
B.C.'S FRUIT & NUT EXPORTS
2012 MARKET SHARE
(% OF $343.6 MILLION)



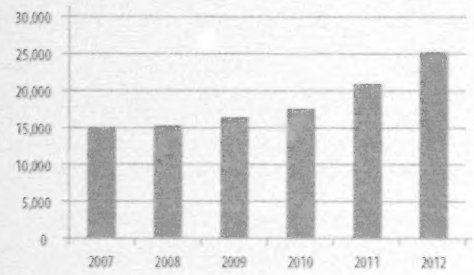


B.C. BERRIES *and* GRAPES

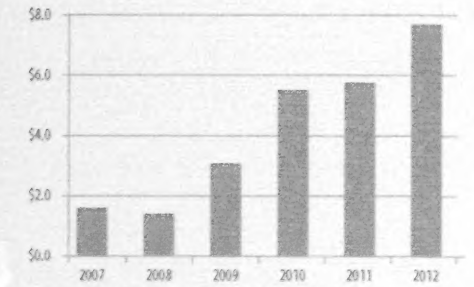
B.C. BERRIES MARKETED PRODUCTION (TONNES)



B.C. GRAPES MARKETED PRODUCTION (TONNES)



ANNUAL WINE EXPORTS FROM B.C. ($ MILLIONS)



B.C. farmers produced Canada's largest berry crop in 2012, valued at close to $198 million, and Canada's second largest grape crop, valued at more than $54 million.

B.C. farmers produced over 94,000 tonnes of berries and over 25,000 tonnes of grapes in 2012, accounting for 69 per cent of Canada's total berry production and 27 per cent of the nation's total grape production.

BERRIES: Ideal growing conditions, close proximity to food packers and processors, and easy access to B.C.'s highly integrated transportation system, has made the Lower Mainland of B.C. one of Canada's most important regions for berry production.

Blueberries accounted for 56 per cent of B.C.'s total berry production in 2012, followed by cranberries at close to 33 per cent, raspberries at 10 per cent and strawberries and other berries accounted for the remainder.

Total farm cash receipts from berries reached close to $198 million, accounting for 57 per cent of the province's total fruit receipts and nearly 43 per cent of Canada's total berry receipts.

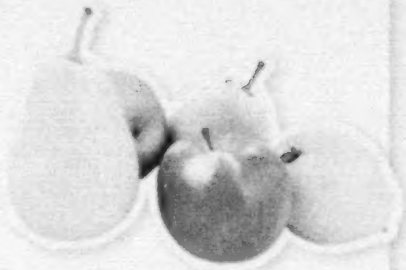
GRAPES: Grape growers have more than doubled production since 2000, as demand for high-quality grapes from B.C.'s wine industry continues to grow. In 2012, B.C. produced over 25,000 tonnes of wine and table grapes, an increase of 21 per cent over 2011 and 49 per cent over the previous five-year average.

B.C.'s grape growers generated farm cash receipts of over $54 million, accounting for 15 per cent of the province's total fruit receipts and nearly 38 per cent of Canada's total grape receipts.

Exports of B.C. wines were valued at over $7.7 million in 2012, an increase of 34 per cent over 2011 and an increase of over 450 per cent since 2008.

B.C. TREE FRUITS

B.C. growers produced Canada's largest tree fruit crop in 2012, generating $96 million in farm cash receipts.



In 2012, B.C. produced over 97,000 tonnes of apples, more than 13,600 tonnes of sweet cherries, over 5,200 tonnes of peaches, nearly 4,700 tonnes of pears, and more than 2,300 tonnes combined of plums/prunes, nectarines, apricots, and other tree fruits. In total, the province produced close to 122,000 tonnes of tree fruits, more than one-third of the total Canadian production.

Following extreme spring weather conditions that affected most of Eastern North America's apple crop B.C.'s successful apple and other tree fruit production lead the province to rank first in Canada.

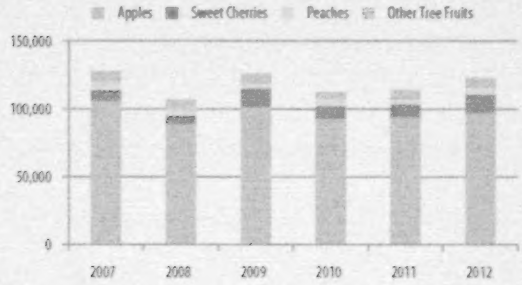
B.C.'s tree fruit growers generated total farm cash receipts of $96 million in 2012, accounting for 28 per cent of the province's total fruit receipts and 39 per cent of the total value of tree fruits in Canada.

The Okanagan is home to most of B.C.'s tree fruit orchards. Apples and sweet cherries are B.C.'s two largest tree fruit crops. Acreage in cherry production has experienced significant expansion over the past few years as the industry continues to position itself to become a strong player in the global market.

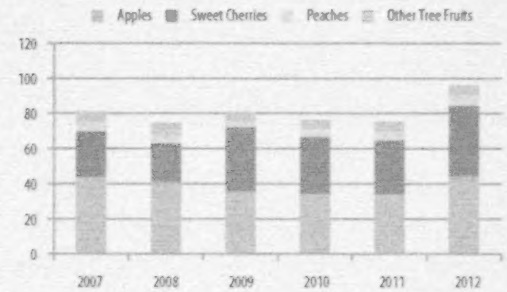
B.C.'s exports of sweet cherries reached $42.4 million in 2012, up six per cent over 2011 and more than double the value of exports five years prior, in 2007.

Top export markets for B.C. cherries in 2012 were Hong Kong, Taiwan and the United States. Hong Kong surpassed the United States to become B.C.'s largest export market in 2012. Exports to Hong Kong increased from just over $0.8 million in 2007 to $17.6 million in 2012, a more than twenty-fold increase in just five years. B.C. cherry exports to Taiwan more than doubled in the last five years, increasing from $4.0 million in 2007 to $8.9 million in 2012.

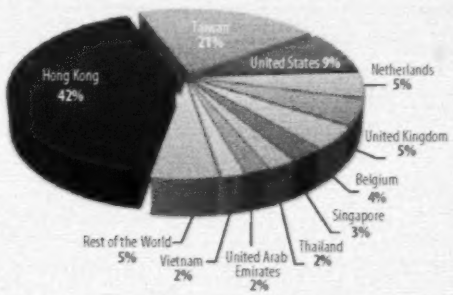
B.C. TREE FRUITS MARKETED PRODUCTION (TONNES)



B.C. TREE FRUITS FARM CASH RECEIPTS ($ MILLIONS)

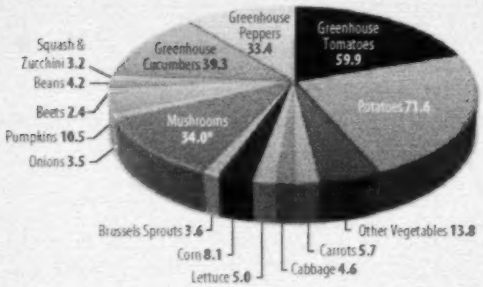


B.C.'S CHERRY EXPORTS 2012 MARKET SHARE (% OF $42.4 MIILLION)

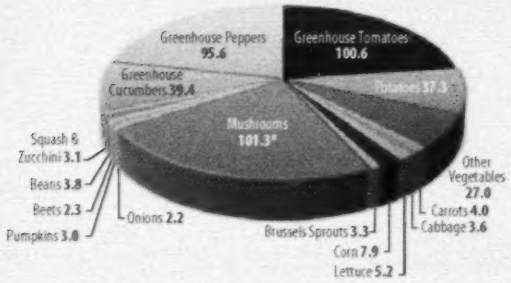


B.C. VEGETABLES

B.C. VEGETABLES 2012 MARKETED PRODUCTION ('000 TONNES)

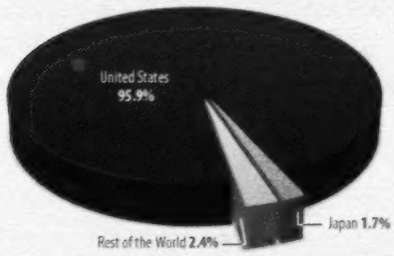


B.C. VEGETABLES 2012 FARM CASH RECEIPTS ($ MILLIONS)



B.C. farm cash receipts were not released for mushrooms in 2012. The estimates reported above are based on industry specialist estimates of the production and value of the sector.

B.C.'S VEGETABLE EXPORTS 2012 MARKET SHARE (% OF $217.0 MILLION)



More than 236,000 tonnes of vegetables were grown by B.C. farmers in 2012, generating over $402 million in farm cash receipts.

B.C. farmers produced and marketed nearly 173,000 tonnes of field vegetables (including mushrooms) and almost 135,000 tonnes of greenhouse vegetables in 2012.

More than $199 million in farm cash receipts were generated from B.C.'s field vegetables and mushrooms and more than $240 million were generated from greenhouse vegetables. B.C. accounted for 18 per cent of Canada's total field vegetable and mushroom receipts and 23 per cent of Canada's total greenhouse vegetable receipts in 2012.

Mushrooms and potatoes were B.C.'s highest value non-greenhouse vegetable crops, followed by corn, lettuce, carrots, beans, cabbage, and Brussels sprouts.

Although the majority of vegetables are grown in the fertile Fraser Valley region, fresh B.C. vegetables are available at farmers markets or farm-side stands in almost every community in the province.

B.C. exported over $217 million worth of vegetable products to 34 different markets in 2012. The top five vegetable exports included mushrooms ($69 million), tomatoes ($59 million), peppers ($56 million), cucumbers ($12 million) and potatoes ($8 million). The United States continued to be the top export market, importing $208 million (96 per cent) worth of B.C. vegetable products.

B.C. Greenhouse Vegetables

B.C.'s greenhouse growers generated more than $240 million in total farm cash receipts in 2012, including nearly $101 million in tomatoes, nearly $96 million in peppers, over $39 million in cucumbers, and over $4 million in other greenhouse vegetable products.

Close to 135,000 tonnes of greenhouse vegetables were grown in B.C. in 2012, including nearly 60,000 tonnes of tomatoes, over 39,000 tonnes of cucumbers, and more than 33,000 tonnes of peppers, in addition to smaller quantities of other greenhouse vegetables, such as lettuce and eggplant. B.C.'s production accounted for 22 per cent, 13 per cent and 31 per cent of Canada's greenhouse tomato, cucumber and pepper production respectively.

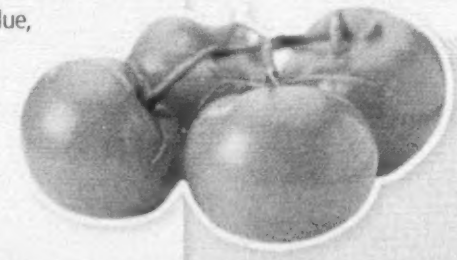
For the first half of 2012, a lack of sunshine hampered early fruit set for greenhouse crops and resulted in a six per cent decline overall in B.C.'s total greenhouse production compared to 2011. Also in 2012, growers faced lower prices, with continued North American competitiveness challenges. The combination of lower production and poor prices resulted in a decline in total farm cash receipts in this sector.

In 2012, B.C.'s greenhouse tomatoes accounted for 42 per cent, peppers for 40 per cent, cucumbers for 16 per cent, and other vegetables for two per cent of the province's $240 million total greenhouse receipts. B.C.'s greenhouse vegetable sector accounted for nearly 18 per cent of the province's total crop receipts and eight per cent of B.C.'s total farm cash receipts.

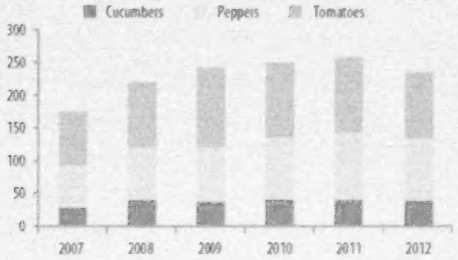
B.C.'s growers generated 32 per cent, 23 per cent, 14 per cent, and nine per cent of Canada's greenhouse pepper, tomato, cucumber, and other greenhouse vegetable receipts, respectively.

The majority of greenhouse operations are concentrated in the Greater Vancouver and Fraser Valley areas of the province's Lower Mainland. B.C.'s greenhouse growers continue to be world leaders in the use of integrated pest management and innovative greenhouse technologies, producing high quality vegetables available almost year-round.

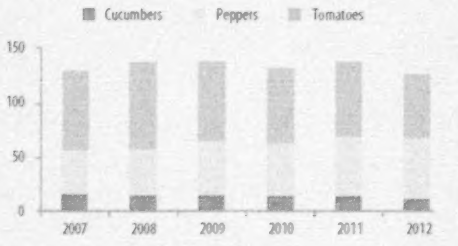
In 2012, B.C. exported nearly 58 tonnes of greenhouse vegetables at a value of over $126 million. Tomatoes accounted for over 31,000 tonnes and $58 million of B.C.'s total greenhouse vegetable export value, peppers for over 19,000 tonnes and $56 million in value, and cucumbers for over 6,000 tonnes and close to $12 million in value. The United States continued to be B.C.'s largest export market for greenhouse vegetables in 2012, accounting for over 99 per cent of all export sales.



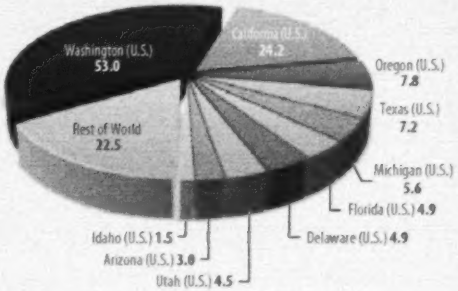
B.C. GREENHOUSE VEGETABLES FARM CASH RECEIPTS ($ MILLIONS)



B.C. GREENHOUSE VEGETABLE EXPORTS ($ MILLIONS)

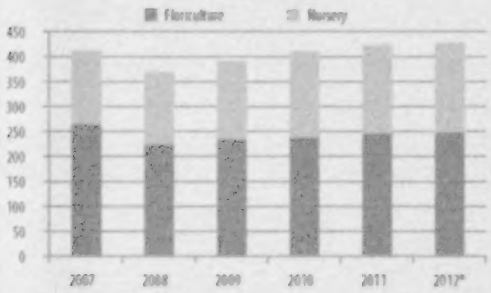


B.C. GREENHOUSE VEGETABLE EXPORTS TOP MARKETS IN 2012 ($ MILLIONS)



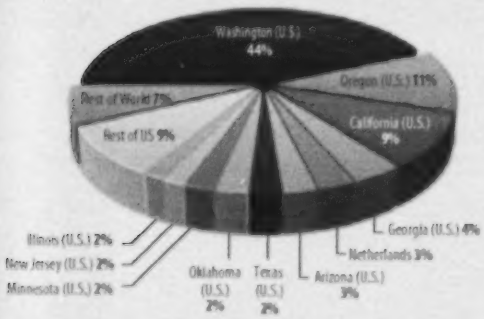
B.C. FLORICULTURE *and* NURSERY PRODUCTS

B.C. FLORICULTURE AND NURSERY ANNUAL FARM CASH RECEIPTS ($ MILLIONS)



*B.C. farm cash receipt estimates were not released separately for floriculture and nursery in 2012. Reported shares above are based on 2011 estimates applied to the 2012 total floriculture and nursery estimate that was released by Statistics Canada.

B.C. FLORICULTURE & NURSERY PRODUCTS 2012 EXPORT MARKET SHARE (% OF $58.2 MILLION)



Floriculture and nursery products generated nearly $428 million in combined revenues in 2012, ranking second largest in Canada in farm cash receipts.

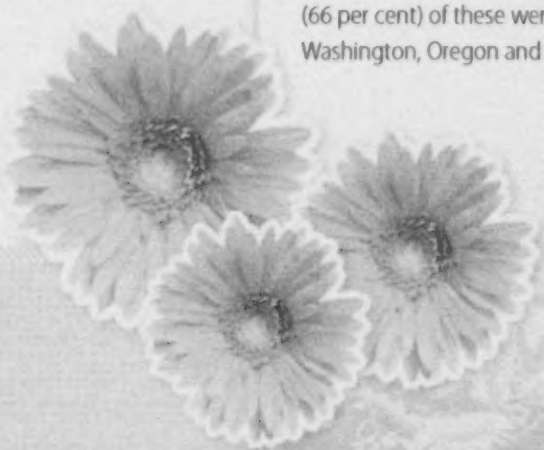
Excellent weather resulted in strong sales through the Victoria Day weekend and positively impacted B.C.'s floriculture and nursery sectors' farm cash receipts in the first half of 2012. The weather then turned very cool and wet through the end of June, resulting in a slight overall one per cent growth in farm cash receipts across both sectors.

FLORICULTURE: Freshness and diversity are hallmarks of B.C.'s floriculture industry. With over 92 million cut flowers, 47 million potted plants, 43 million bedding plants, and 31 million plant cuttings produced in 2012, floriculture was B.C.'s third largest sector in terms of farm cash receipts.

In 2012, B.C. continued to produce a wide range of indoor and outdoor potted plants – including geraniums, petunias, begonias, pointsettias, primulas, chrysanthemums, outdoor hanging pots, gerberas, lilies, azaleas, orchids, and tropical foliage and plants – as well as an array of cut flowers – including tulips, alstroemerias, chrysanthemums, gerberas and roses.

NURSERY: Since the first nursery farms were established on Vancouver Island and Salt Spring Island in the mid 1880's, B.C.'s nursery industry has grown to become Canada's second largest producer. In 2012, B.C.'s farmers produced close to 195 million nursery tree seedlings, more than eight million perennials and annuals, more than five and a half million coniferous shrubs and evergreen broadleaf shrubs, more than five and a half million shade and ornamental trees, nearly four million deciduous shrubs and roses, close to two million fruit trees and small fruit bushes, and close to one million vines.

B.C.'s floriculture and nursery product exports totaled $58.2 million in 2012. Ninety per cent of B.C.'s products were exported to the U.S. and two-thirds (66 per cent) of these were exported to the three northwestern states, Washington, Oregon and California.



Total combined farm sales from B.C.'s livestock and poultry sector reached $1.39 billion in 2012, an increase of nearly seven per cent over 2011 and 11 per cent over the previous five-year average.

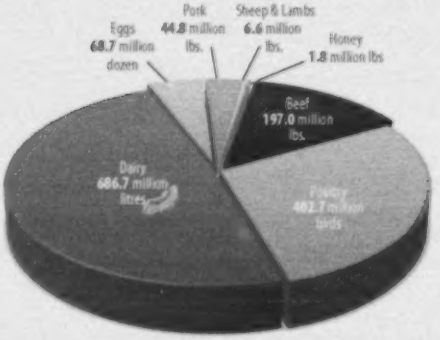
Livestock and poultry production, including beef, dairy, chickens, turkeys, eggs, pork, sheep, lambs and other animals and animal products, is an economic cornerstone of many B.C. communities.

Approximately half (9,228 or 49 per cent) of all of B.C.'s 19,759 farms predominantly raise livestock, poultry or other animals. At the end of 2012, there were 545,000 cattle and calves on farms in B.C. including: 199,500 beef cows and 37,500 beef replacement heifers; 72,900 dairy cows and 35,300 dairy replacement heifers; 11,500 bulls; and 190,000 slaughter heifers, steers and calves. In addition, there were 88,000 pigs, 47,000 sheep and lambs, 8,500 bison, nearly 43,000 honey bee colonies and over 146,000 other animals (primarily horses, goats, rabbits, llamas, alpacas, and farmed deer). At any one point in time during the year, there were approximately 20 million poultry birds on farms in B.C., however, with the rotation cycle, five times this number of birds were marketed in 2012.

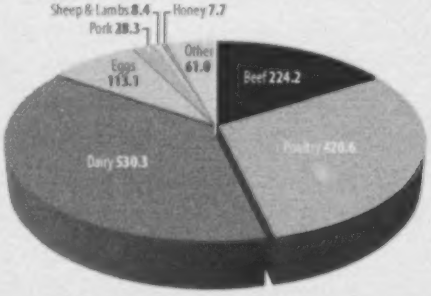
2012 was marked by the worst drought in a half-century in the U.S. Midwest crop region. This drove up commercial feed prices, impacting the many B.C. livestock industries that are dependent on imported commercial feed and feed grains.

B.C. exported close to $220 million worth of live animals, meat and animal products in 2012, an increase of over $11 million (5 per cent) from 2011.

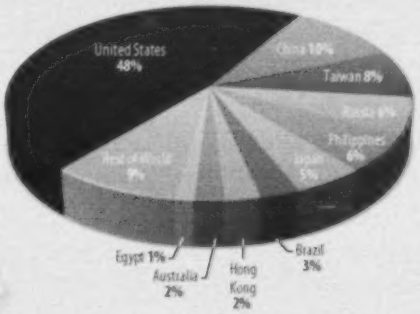
B.C. LIVESTOCK & POULTRY PRODUCTS
2012 MARKETED PRODUCTION



B.C. LIVESTOCK & POULTRY PRODUCTS
2012 FARM CASH RECEIPTS
($ MILLIONS)

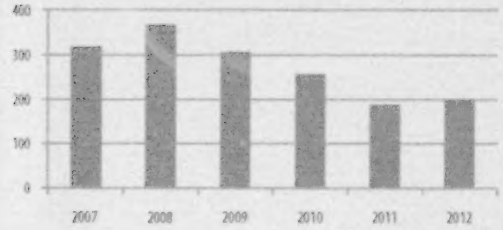


B.C. LIVESTOCK & POULTRY PRODUCTS
2012 EXPORT MARKET SHARE
(% OF $219.8 MILLION)

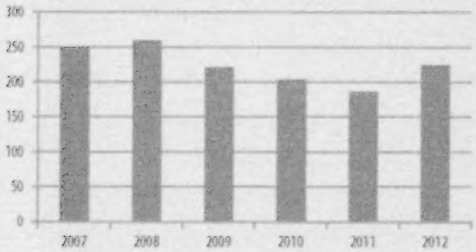


B.C. BEEF *and* DAIRY

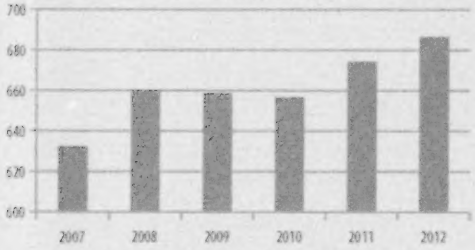
B.C. BEEF 2012
MARKETED PRODUCTION
(MILLION POUNDS)



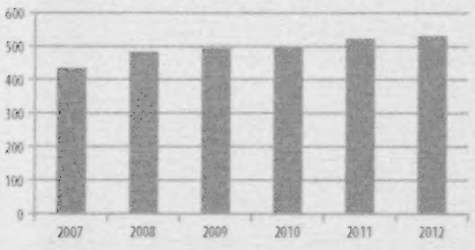
B.C. BEEF
FARM CASH RECEIPTS ($ MILLIONS)



B.C. DAIRY PRODUCTION
(MILLION LITRES)



B.C. DAIRY
FARM CASH RECEIPTS ($ MILLIONS)



B.C.'s beef farmers generated over $224 million in farm cash receipts, an increase of 20 percent over 2011, while B.C.'s dairy producers generated over $530 million in receipts.

BEEF: In 2012, the cattle industry in B.C. raised and marketed over 231,000 head of cattle and calves, with a total combined weight of 197 million pounds, and generated farm cash receipts of over $224 million.

There were close to 19,000 more beef cattle and calves marketed in 2012 and an additional eight million pounds of meat, resulting in an additional $37.7 million dollars into the sector. This represents an increase of nearly nine percent in animals, four per cent in marketed production and over 20 per cent in receipts generated over 2011 – the first increase seen in the industry since 2008.

B.C.'s competitive advantage in beef production lies in access to forage, predominately on Crown range pastoral areas with green fields, clean air and water, and habitat for wildlife as well as domestic animals. Most B.C. cattle are raised on pasture or range land, and then are either transported to a feedlot for grain finishing to slaughter weight or grass finished on pasture. About 85 per cent of B.C. feeder calves are sold into Alberta for finishing.

The Thompson-Okanagan, Cariboo, Nechako and Peace River regions are the top beef producing regions in B.C.

DAIRY: B.C.'s dairy farmers produced 686.7 million litres of milk in 2012, generating over $530 million in farm cash receipts. This is 1 per cent above receipts in 2011 and 9 per cent above the previous five-year average.

With close to 40 per cent of the province's total livestock receipts and 19 per cent of the province's total farm cash receipts, the dairy sector continues to account for the largest share of provincial farm cash receipts.

Approximately two-thirds of B.C.'s more than 500 licensed dairy producers are located in the Fraser Valley, nearly one-fifth are located in the Thompson-Okanagan region and close to 10 per cent are on Vancouver Island. The remaining producers are located across the Cariboo, Kootenay and Peace River regions.

B.C. POULTRY, EGGS *and* PORK

B.C.'s poultry receipts rose nearly six per cent in 2012 to $421 million, egg receipts rose 10 per cent to almost $113 million and pork receipts remained constant at $28 million.

POULTRY: Poultry farmers in B.C. raised and marketed over 100 million chickens and over 2.7 million turkeys, with a total combined weight of nearly 183 million kilograms (403 million pounds).

Chicken production remained relatively constant at slightly more than 160,000 tonnes in 2012, while turkey production rose over five per cent to 21,400 tonnes. Prices continued to trend upward for both poultry products, resulting in a near six per cent increase in total poultry farm cash receipts, and generating total farm cash receipts of almost $421 million.

B.C. exported close to $39 million in poultry products to 30 different markets in 2012. Taiwan was the largest export market, receiving over $12 million in chicken products.

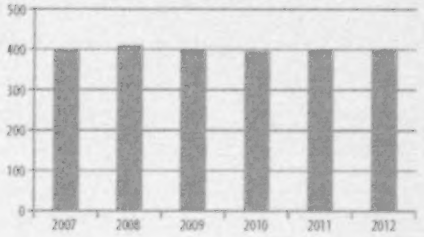
EGGS: B.C.'s egg farmers produced nearly 69 million dozen eggs in 2012, generating farm cash receipts of more than $113 million. B.C.'s total egg receipts in 2012 were 10 per cent above 2011's receipts and 25 per cent over the previous five-year average.

PORK: B.C. pork producers raised and marketed 198,000 hogs, amounting to almost 45 million pounds in total weight, and generated over $28 million in farm cash receipts in 2012.

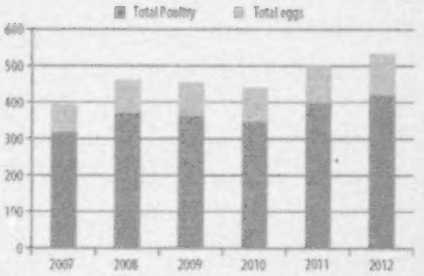
The majority of producers are located in the Lower Mainland-Southwest region, a large and growing market area that offers cultural and ethnic diversity, and a wide range of potential niche market segments. The average commercial hog operation in B.C. manages about 7,000 hogs annually.

The B.C. hog industry is shifting to specialty pork production with their newly branded B.C. pork, further supported by a strongly developed infrastructure of traceability, food safety, bio-security and animal care. B.C. exported over $74 million worth of processed pork products to 17 different markets in 2012. China was B.C.'s largest export market, receiving over $20.5 million in pork products.

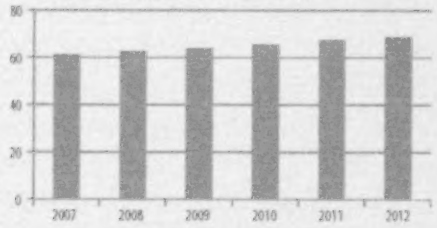
B.C. POULTRY
MARKETED PRODUCTION
(MILLION POUNDS)



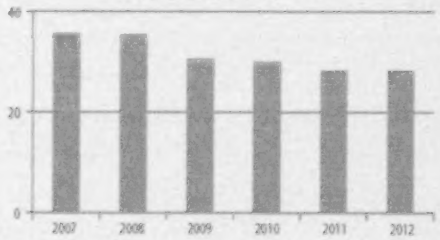
B.C. POULTRY AND EGGS
FARM CASH RECEIPTS ($ MILLIONS)



B.C. EGGS
MARKETED PRODUCTION
(MILLION DOZEN)



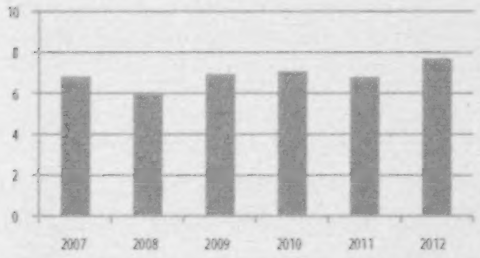
B.C. PORK FARM CASH RECEIPTS
($ MILLIONS)



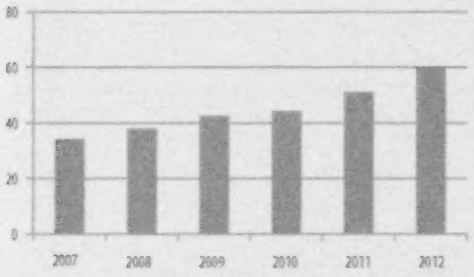
OTHER ANIMALS *and* ANIMAL PRODUCTS

B.C. SHEEP AND LAMBS
FARM CASH RECEIPTS ($ MILLIONS)

B.C. HONEY
FARM CASH RECEIPT ($ MILLIONS)



B.C. OTHER ANIMALS AND ANIMAL PRODUCTS
FARM CASH RECEIPTS ($ MILLIONS)



SHEEP *and* LAMBS: B.C. farmers marketed over 57,000 lambs and over 6,000 sheep in 2012, generating total farm cash receipts of $8.4 million. Of the total lambs marketed in B.C. each year, 33,000 on average are imported from other provinces, in order to fill local demand.

Lamb prices hit record highs in 2011 and then fell 18 per cent in 2012, resulting in a 26 per cent decline in farm cash receipts.

Sheep and lambs continue to be important due to their versatility and ability to graze shrubs and short grasses, which allow farmers to efficiently utilize small and/or otherwise unproductive acreages of land.

At the end of 2012, there were 47,000 sheep and lambs on 1,600 sheep farms in B.C. Approximately one-quarter of these farms are located on Vancouver Island, one-quarter are in the Thompson-Okanagan region, and 10 to 15 per cent reside in each of the Lower Mainland, Cariboo and Peace regions.

BEES *and* HONEY: In 2012, B.C. produced almost two million pounds of honey (two per cent of total Canadian production), generated $7.7 million in farm cash receipts and five per cent of total Canadian sales.

B.C. is home to over 2,100 beekeepers and over 42,500 colonies of honeybees, a 10 per cent increase in keepers and a 10 per cent increase in colonies over 2011. B.C. accounted for over one-quarter of Canada's 8,100 beekeepers.

Sixty per cent of B.C.'s honeybee colonies are located in the Lower Mainland-South West region, where many commercial beekeepers are involved with pollination services for the horticulture industry particularly blueberries and apples.

B.C. exported $386 thousand dollars of honey to six countries with Japan accounting for $261 thousand or 68 per cent of the province's total honey export sales. Canada is one of the top honey producers in the world.

OTHER ANIMALS *and* ANIMAL PRODUCTS: B.C. farms raised and produced a number of other animals and animal products which generated $60 million in farm cash receipts in 2012. Revenues from B.C.'s fur farms accounted for one-third of the total value.

These products include: furs, other livestock and livestock products (horses, ponies, goats, llamas, alpacas, rabbits, bison, elk, farmed deer, wild boars, mink breeding stock, fox, donkeys, mules, chinchillas, wool, pregnant horse urine and embryos), other poultry (geese, ducks, roosters, ostriches, game birds, emus, pheasants, quail, pigeons, etc) and other bee products (bee wax, pollen, queen bees and nucs sold).

B.C. GRAINS *and* OILSEEDS

B.C.'s grain and oilseed farmers generated nearly $89 million in farm cash receipts in 2012, a 137 per cent increase over 2011.

Grains and oilseeds dominate the northern landscape in B.C.'s beautiful Peace River region, where two-thirds of B.C.'s 271 grain and oilseed farms reside.

Nearly 293,000 tonnes of grains and oilseeds were marketed by B.C. farmers in 2012, generating farm cash receipts of nearly $89 million, 137 per cent above 2011.

The severe drought in the U.S. corn and grain belt had a positive influence on prices for canola and wheat on both sides of the border in 2012. This, coupled with B.C.'s increased marketings in canola, wheat, barley and oats over 2011, resulted in farm cash receipts more than doubling in each of B.C.'s four major grain and oilseed crops.

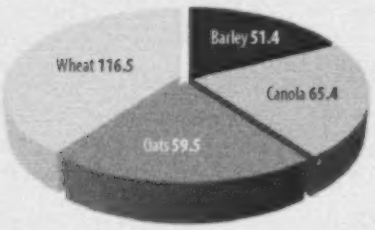
In 2012 B.C.'s farmers marketed 116,500 tonnes of wheat (an 85 per cent increase), 65,400 tonnes of canola (an 89 per cent increase), 59,500 tonnes of oats (a 100 per cent increase), and 51,400 tonnes of barley (a 115 per cent increase) on over 330,000 acres.

Generally, canola and the higher grades of wheat, oats and malting barley are either exported directly or moved into the Canadian processing sector, while the lower grades of wheat, oats and barley are moved into the domestic feed markets.

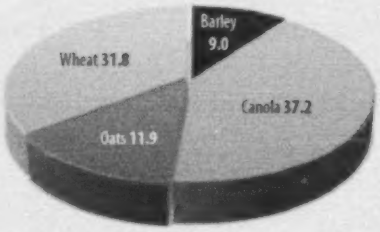
Changing weather combined with a short growing season in B.C. limit the choices of crops and varieties that can be grown and require very timely cultural operations. Farmers continue to work together within the B.C. Grain Producers Association to conduct regionally focussed research by testing crops, evaluating new crop varieties for regional suitability, and researching herbicide systems, fertilizer blends and other important factors that contribute to the success of the industry.

B.C. exported $15.7 million in grain and oilseed products in 2012, a decrease of 53 per cent over 2011.

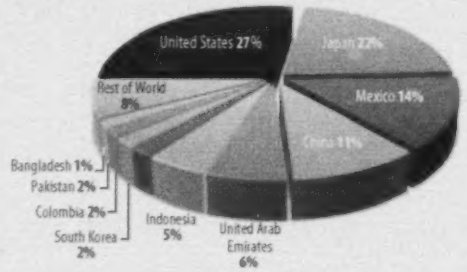
B.C. GRAINS & OILSEEDS
2012 MARKETED PRODUCTION
('000 TONNES)



B.C. GRAINS & OILSEEDS
2012 FARM CASH RECEIPTS
($ MILLIONS)

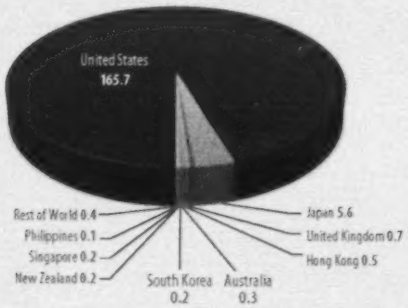


B.C. GRAINS & OILSEEDS EXPORTS
2012 MARKET SHARE
(% OF $15.7 MILLION)

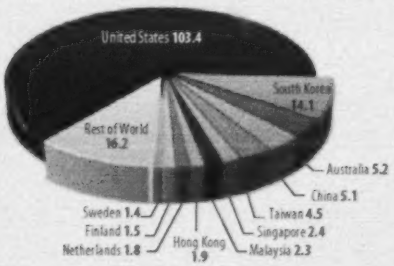


B.C. FOOD *and* BEVERAGE PROCESSING

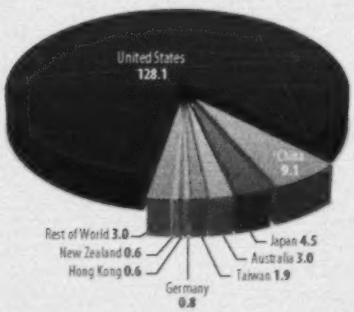
B.C. BAKED GOODS & OTHER GRAIN PREPARATIONS 2012 EXPORT MARKETS ($ MILLIONS)



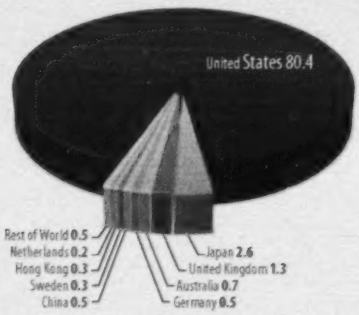
B.C. SAUCES, SOUPS & FOOD PREPARATIONS 2012 EXPORT MARKETS ($ MILLIONS)



B.C. BEVERAGES, SYRUPS & CONCENTRATES 2012 EXPORT MARKETS ($ MILLIONS)



B.C. CHOCOLATE & CONFECTIONARY 2012 EXPORT MARKETS ($ MILLIONS)



The food and beverage processing industry was the largest among B.C.'s manufacturing industries in 2012, generating $8.2 billion in shipments and employing close to 18 per cent of the province's manufacturing workforce.

B.C.'s food and beverage processing industry is comprised of nearly 1,400 small and medium-sized firms producing agrifoods derived from domestic and imported agriculture and seafood sources.

This structure provides the industry with operational flexibility and the ability to satisfy consumers' diverse tastes and preferences. Most processors are strategically located in close proximity to raw material suppliers and B.C.'s highly integrated transportation system, making it easy to access ingredients and ship finished goods. More than 90 per cent of these processors had less than 100 employees in 2012.

B.C. enjoys a relatively strong local market, driven by the largest population amongst Canada's western provinces and one of the highest average annual food expenditures per household. These consumers insist on high food safety and quality food products produced in a sustainable manner, which is driving growth and innovation in B.C.'s food processing industry. Growing segments of B.C.'s food processing market include ethnic, organic and functional foods, herbal and botanical products, specialty pet foods and nutraceuticals.

Strategically located at the crossroads of the Asia-Pacific marketplace, B.C.'s food and beverage processors are uniquely positioned to supply food markets across Canada, the United States and Asia.

In 2012, exports of baked goods and other grain preparations increased by three per cent from $169 million to $174 million; exports of sauces, soups & food preparations increased by nine per cent from $146 million to $160 million; exports of beverages, syrups & concentrates increased by close to two per cent from $149 million to $152; and exports of chocolate & confectionary products increased by 19 per cent from $73 million to $87 million.

DATA SOURCES / MORE INFORMATION

DATA SOURCES

Production, farm cash receipts, manufacturing shipment values, and employment data sourced from Statistics Canada.

Specific industry data obtained from industry associations, where necessary.

Export data sourced from Statistics Canada through the Global Trade Atlas and CATSNET databases.

CONTACT INFORMATION

This report is available online at: *http://www.al.gov.bc.ca/stats/*

FOR MORE INFORMATION ON B.C. FOOD PRODUCTS AND SUPPLIERS, PLEASE CONTACT:

MINISTRY OF AGRICULTURE
PO Box 9120 STN PROV GOV | Victoria, B.C. V8W 9B4
Email: *alstats@gov.bc.ca*

FOR MORE INFORMATION ON B.C.'S SEAFOOD INDUSTRY:
please visit *www.bcseafood.ca*

FOR MORE INFORMATION ON THE PROVINCE OF BRITISH COLUMBIA:
please visit *www.britishcolumbia.ca*

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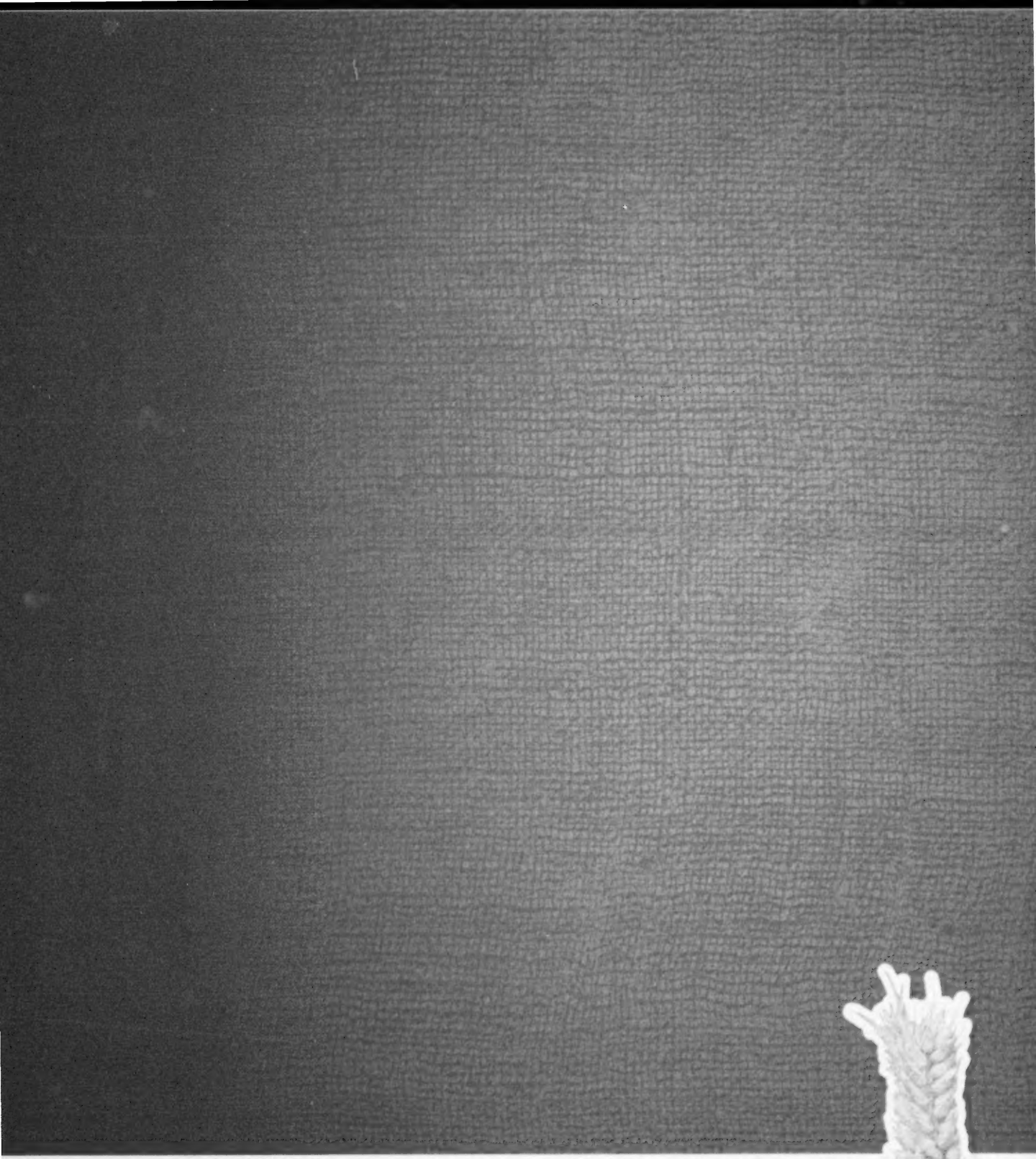

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